



Panel Processor

User Guide

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Overview

The Panel Processor application allows users to upload panels into the HIE. The application allows users to upload panels for various services, like the Encounter Notification System® (ENS®).

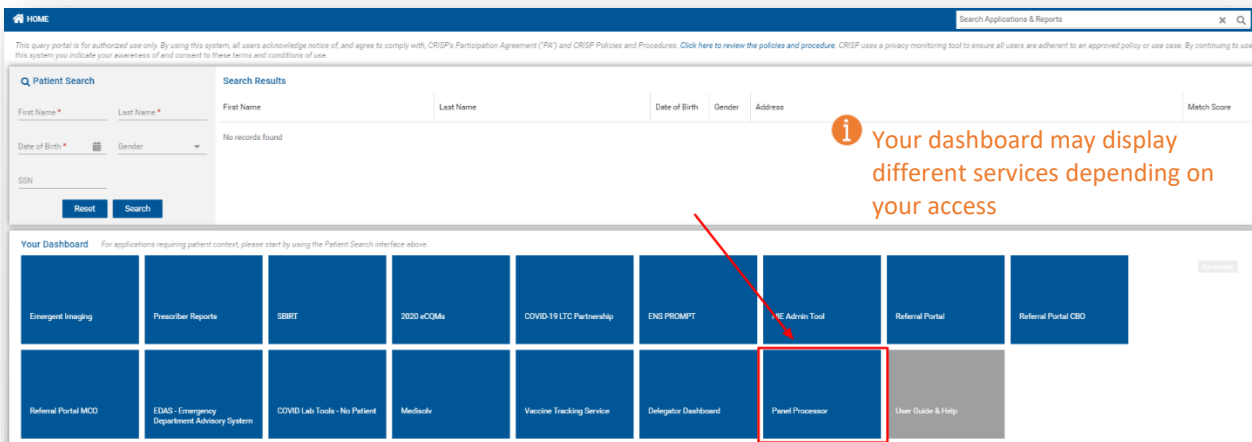
Panels are lists or rosters of patients with whom you or your organization has a treatment relationship.

ENS® is a service that enables subscribers to receive real-time alerts when patients on their panel have a hospital encounter. You can learn more about or sign up for the ENS® service by visiting your HIE's website.

Accessing the Panel Processor

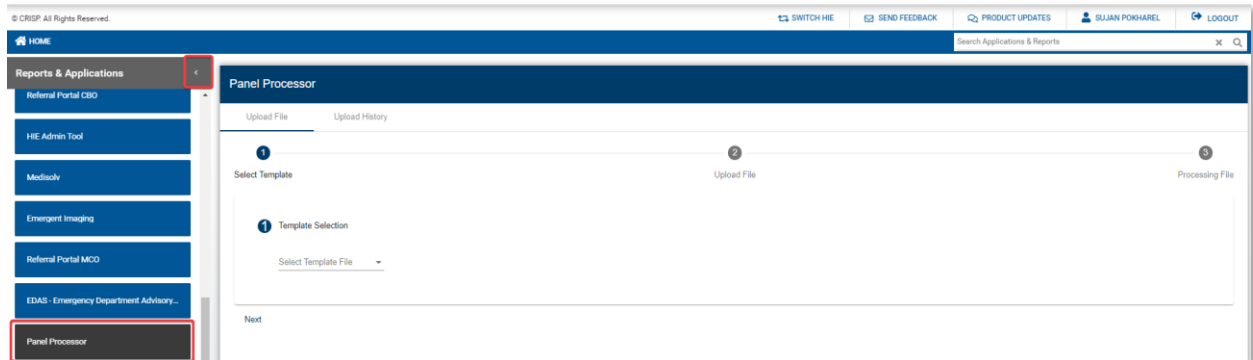
Users access the Panel Processor application within the HIE Portal. To access the Panel Processor, users must:

- Log into the HIE Portal with their username, password, and two-factor authentication credentials.
- Click the 'Panel Processor' service card from your dashboard to launch the application. Your dashboard will consist of all the services you have available to access. Each service displays on a card.

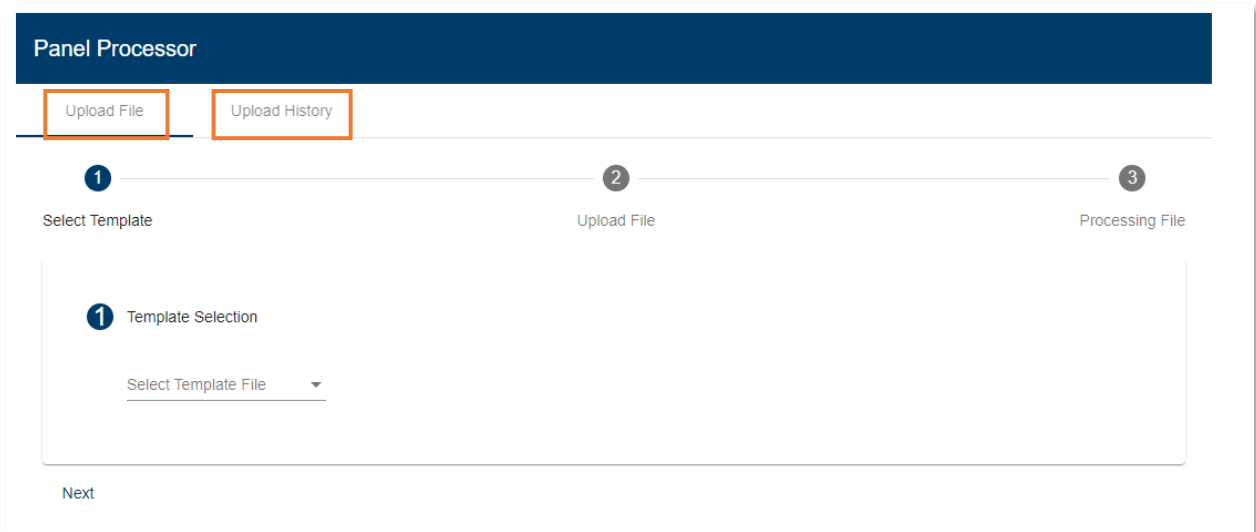


Panel Processor Home Screen

The Panel Processor will display within an eye frame with the 'Reports & Applications' toolbar on the left side and the Portal toolbar at the top of the screen. You can expand the screen by clicking the arrow next to 'Reports & Applications' to collapse the side toolbar.



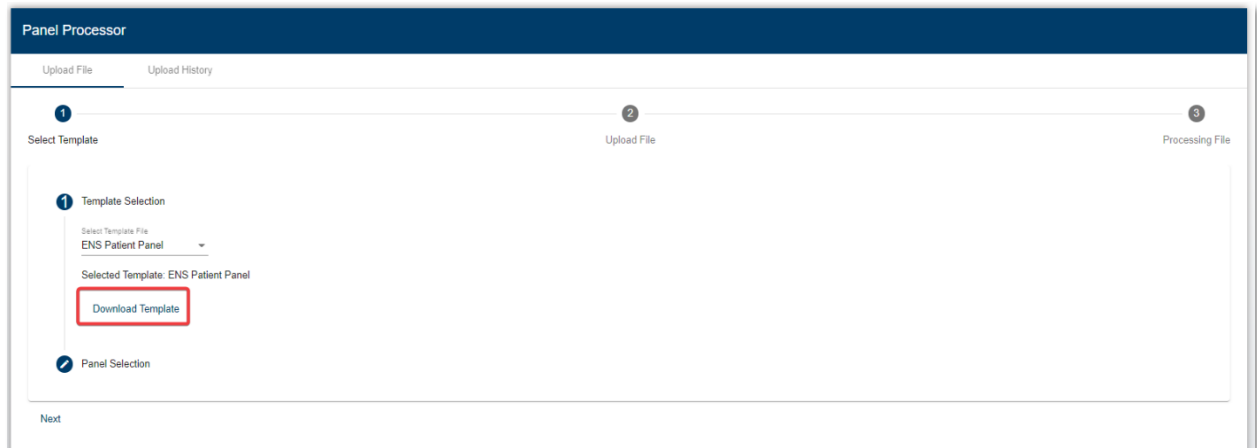
There are two tabs within the Panel Processor Application – 'Upload File' and 'Upload History'. The 'Upload File' tab is where users can submit a panel following the process prompts. Users can view the results of Previous successful and unsuccessful upload attempts in the 'Upload History' tab.



Users must select a template to submit a panel through the Panel Processor. Templates are defined file formats with specific column fields and field data types. Each service using the Panel Processor will have a unique template.

Templates

Templates are defined file formats with specific column fields and field data types. Users can download a template with the processor after selecting a template. Users are strongly encouraged to use the template without making any changes to the column headers to minimize any format-related issues.



Encounter Notification System® (ENS®)

ENS® is a service that enables subscribers to receive real-time alerts when patients on their panel have a hospital encounter. You can learn more about or sign up for the ENS® service by visiting your HIE's website.

The ENS® panel template contains the required and optional fields to submit for processing. The table below highlights all available fields in the ENS panel template. The template is titled 'ENS Patient Panel' and will download in .xlsx or excel workbook format. **However, each ENS panel submission must be in a .csv file format. The file name of each submission must be in the following format:**

- **[subscriber code]-1-z-MM-dd-yyyy (i.e: Panel_DEMO-1-z-08-05-2022)**

ENS® Panel Template Values

Field Name	Required	Example Value	Notes
Group			
Member_Status		ADD	Column is required, but can be left blank
Patient_ID	x	999999	No punctuation allowed
First_Name	x	John	No punctuation allowed
Middle_Name		K	No punctuation allowed
Last_Name	x	Doe	No punctuation allowed
Name_Suffix		Mr.	
Address_1	x	33 main st	
Address_2		apt 45	Provide these values if available
City	x	Baltimore	

ENS® Panel Template Values Continued

Field Name	Required	Example Value	Notes
State	x	MD	
Zip	x	21230	
Birthdate	x	12/31/1900	
Gender	x	M	
SSN		999-99-9999	Provide these values if available
Home_Phone		3025551212	
Work_Phone		3025551212	
Cell_Phone		3025551212	
Practice		Practice A	
Location		555 Healthy Way	
PCP		Dr. Smith	
NPI		1111111111	
TaxID		1111111111	
Insurance		Carefirst BCBS	
ACO		ACO 1	
Account_Number		8888888	
ENS_Startdate		9/27/2015	
Care_Program		Healthy Care	
Care_Program_StartDt		10/1/2014	
Care_Program_EndDt		9/1/2015	
Care_Manager		John Doe	
Care_Manager_Phone		111-111-1111	
Care_Manager_Email		john.doe@practicea.com	
RiskScore1		20	
RiskMethodology1		HCC	
RiskScore2		24	
RiskMethodology2		Risk Score A	
Region		Montgomery County	
DirectEmail		abc@ainq.direct.org	
DocHalolD		123456	
Follow Up Date		9/20/2015	
Appointment Missed Date		9/5/2015	
Care_Alert		Patient may have experienced a controlled substance event on 9/6/2015 at hospital 4.	
Assigning_Authority_Code		ENS_CODE	

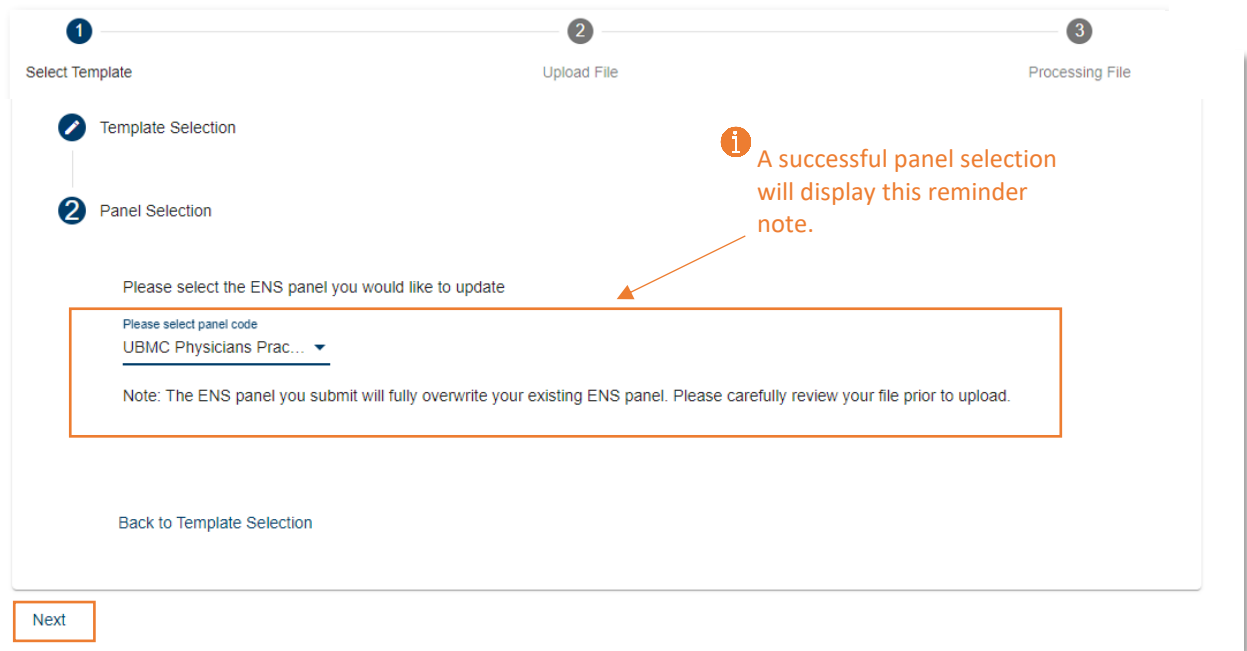
Submitting a Panel

To submit a panel through the Panel Processor user must:

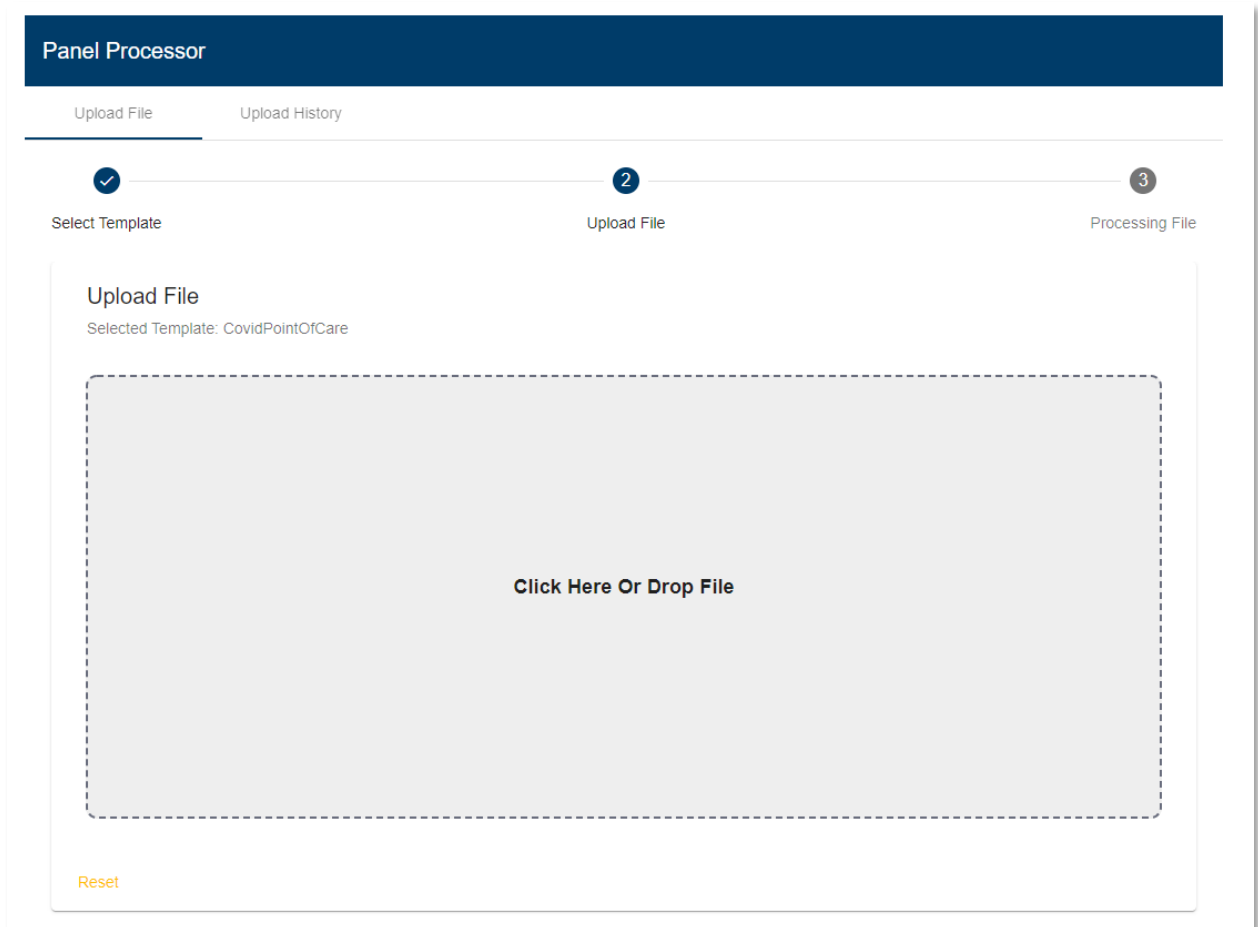
1. Select the template of the service your panel will be used for. For ENS panel submissions, select the template titled 'ENS Patient Panel'. Review the 'ENS Template' section above to understand the file requirements.
 - a. For ENS Panel Submissions, Select the panel you want to update. The Panel Processor will prompt you to select a panel by name and source code. A source code is a unique set of letters used within the HIE to identify a panel.

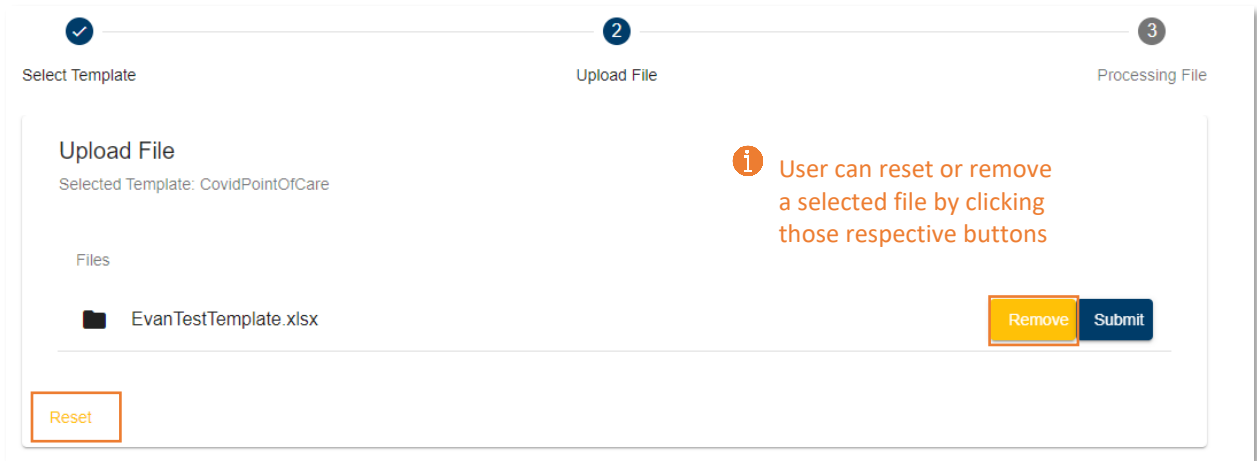
The screenshot shows the 'Panel Processor' interface with a dark blue header. Below the header are two tabs: 'Upload File' (active) and 'Upload History'. A progress bar at the top indicates three steps: 1. Select Template, 2. Upload File, and 3. Processing File. The main content area is titled 'Panel Selection' and contains the following text: 'Please select the ENS panel you would like to update'. Below this is a dropdown menu labeled 'Please select panel code'. At the bottom of the content area is a link 'Back to Template Selection'. A 'Next' button is located at the bottom left of the interface.

This screenshot shows the same 'Panel Processor' interface as above, but with an error message displayed. The error message is enclosed in an orange-bordered box and reads: 'There are no ENS panels configured for you to update. If you feel this is an error, please contact CRISP Support at 877.952.7477 or support@crispehealth.org'. An orange information icon (i) with an arrow points to the error message. Above the error message, an orange text box states: 'If you do not have any ENS Panel available to update, you will receive this error message.' The 'Back to Template Selection' link is visible at the bottom of the content area.



2. Navigate to the 'Upload File' step by clicking 'Next', 'Upload File', or directly on the number two icon.
3. Upload the completed patient panel file by dragging or clicking the grey box on the screen.





4. Click 'Submit' to load the panel to the processor.

The processor will now perform an initial check to validate the file type and file size. These checks take only a few seconds. File type must be csv. File size can be no larger than 100 MB.

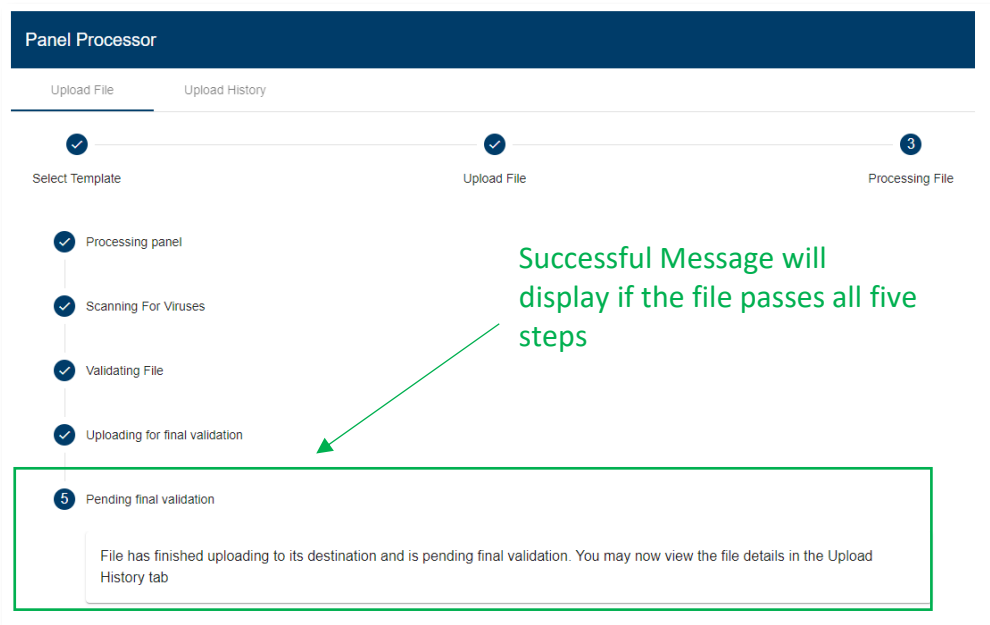
A successful file upload will advance the user to the 'Processing File' tab. While a failed upload will display an unsuccessful message on the screen.



The Processing File step does not require any further action from the user. This step displays the real time actions the Panel Processor is performing to further validate and upload the file. The steps the Panel Processor will take are the following:

1. **Processing File** – the processor will check to validate file type and file size
2. **Scanning for Viruses** – the processor will check for any viruses in the file.
3. **Validating File** – the processor will confirm data within the file are correct to the template specifications. See the ENS Template section above for how to correctly fill out the panel file.
 - a. If a file fails this step, users can view the error details in the 'Upload History' tab.

- b. Even if one row fails out of one hundred rows, the whole file will fail to process.
- 4. Uploading for Final Validation** – the processor will send the file to the correct database location within the HIE.
 - 5. Pending Final Validation** – the processor will confirm the file is received by the correct database successfully.



Upload History

The 'Upload History' tab displays all file upload attempts which passed the initial check to validate the file type and size. In other words, the results of any attempt to upload a file where a user could view the 'Processing File' step will appear here.

Users will primarily use the 'Upload History' tab to understand why a panel file failed the 'Validating File' step. However, this tab can also be helpful to view when you last uploaded a panel to a particular source code.

The table on the 'Upload History' tab will contain a row for each file upload attempt. Each row contains the template used, the date and time of the attempted upload, the source code, the file name, the number of rows within the file, and file status.

The status refers to if the file has been successfully submitted. For example, a 'Succeeded' status message tells the user their ENS service will send alerts based on that loaded panel. The table below displays the possible statuses for panel uploads.

Panel Processor					
Upload File		Upload History			
Template	DateTime Added (UTC)	Source Code	File Name	Total Rows	Status
CovidPointOfCare	07/14/22 06:13 PM	CRISP_DEMO	Covid_Bulk_Upload_FileC.csv	9	Not Started
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_FileB.csv	9	Not Started
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started
CovidPointOfCare	07/14/22 06:12 PM	CRISP_DEMO	Covid_Bulk_Upload_FileA.csv	9	Not Started
CovidPointOfCare	07/14/22 05:20 PM	CRISP_DEMO	Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started
CovidPointOfCare	07/14/22 03:14 PM	CRISP_DEMO	2022-07-14T03-13-45-Covid_Bulk_Upload_File10_rowscomma.csv	9	Not Started

Status	Description
Not Started	ENS has not started processing the file
Processing	Processing of the file is underway
Error	There is an issue with the file. Please contact your account manager for further assistance.
Succeeded	Panel has been successfully submitted

Users can click anywhere within a row to view additional details on the upload attempt. A pop-up box will appear displaying the number of total, successful, and unsuccessful rows. Failed rows will include an error message to assist the user in correcting for future submission attempts.

Successful Message:

Summary

Filename: DataTypesOptEnforceTemp.csv
Date Uploaded (UTC): 2022-07-26T18:54:55.8033333

1 Total Rows
0 Successful Rows
0 Failed Rows

Example Error Message:

Summary

Filename: EvanTestTemplate_testsources.csv
Date Uploaded (UTC): 2022-07-28T15:10:19.12

0 Total Rows
0 Successful Rows
0 Failed Rows

Row Number	Error
0	Missing Header from Column: MRN
0	Missing Header from Column: PatientAge
0	Missing Header from Column: PatientBirthWeight
0	Missing Header from Column: CompletedNewbornScreening?